



HOW TO...

Create email forms in Excel

It's easy to send forms quickly via email, but if you've ever had difficulties getting them back Janet Swift can help. Here she explains how to create a fail-safe form in Excel that can be adapted for any purpose



It's hardly surprising that email is the preferred way to exchange information. You don't have to wait for a document to arrive in the post and post it back. You can simply complete the round trip in minutes online.

We were prompted to create this tutorial when we received an emailed loan form as an Excel document. Unfortunately, it had to be printed out and signed, and emailing it back involved using a scanner. However, with a few changes a seamless email exchange would be possible.

The form used in this example is designed for requesting loan items. It could quickly be modified for art collections, sports equipment and so on, and could easily be adapted to other purposes such as membership applications and booking reservations – in fact, any situation where the originator wanted to store the feedback in a spreadsheet database.

We were going to use Excel's email Routing slip feature. Its prime purpose is collaboration, enabling team members to review a spreadsheet, but it also automatically returns the file to the sender, making it an ideal vehicle for this scenario. While it seemed great in theory, however, it proved unreliable when used in conjunction with Outlook Express. During testing, forms were successfully sent to intended recipients but often failed on the return leg. After sending spreadsheets to no fewer than five random contacts and realising the problem, we decided to adopt the less sophisticated but more trusted method of sending an email attachment.

To save typing in text that relates to our fictitious scenario, use the rawform.xls file on this month's cover disc. If you prefer to design your own form, you'll be able to use the same formatting techniques. Before emailing the form, you also need to protect it from unwanted changes and save it as a template for re-use.

1 Open the supplied spreadsheet rawform.xls. As well as including text, particular column widths have been adjusted to accommodate the text and numbers entered. The form just needs some formatting to make it more readable. You can use bold for headings and instructions. Select the cells that contain the text you want to format in bold. To do this, click with the mouse on A2. While holding down the Ctrl key, click on A9, A18, A19 and A21. Then just click on the B icon in the Formatting toolbar.

Another way to emphasise text is to increase the font size. Do this to the title in A1. Select this cell and then click on the drop-down arrow to the left of the Font size box. Choose 14. Having done this, you will need to adjust the row height to

accommodate the text. Click and drag down the lower border of the row label. Adjusting row heights is also an effective way to introduce space between the different areas of the form.

2 A common requirement in a spreadsheet document is to centre its title. You might think that the best way to do this is to move the 'Geology Club' entry from A1 to A2, but we are going to use an alternative, neater solution. Select A1:E1 then right-click the selection. Select Format Cells and then, when the dialog box appears, click the Alignment tab. In the Text control area of the form, place a tick next to Merge cells. In the Text alignment section, choose Center from the Horizontal drop-down list. This centres the title over the whole region that has been merged.

3 A20 contains a very long text string. This can be formatted to display conveniently using a combination of the Merge cells and Wrap text options. Select A20:E20, right-click with the mouse and choose Format Cells again, and the Alignment tab opens. This time, place a tick against Wrap text as well as Merge cells. Having done this, you will need to increase the row height by dragging on the lower border until all the text is visible.

4 To ensure that the form is completed properly, we'll use shading to indicate which cells have to be filled in. First use Merge cells to increase the size of the boxes next to Name, Address and Email. Rather than doing each one separately, select B3:D3 and use the Merge cells formatting operation you did in Step 2. Type Ctrl-C to copy, move down to B4 and type Ctrl-V to paste. Do the same in cell B7.

Next, select all the cells that are to be filled in or changed by the people who receive the form. Do this by clicking on B3 and holding down the Ctrl key and selecting B4, B5, B6, B7, B8, the range C10:D17 and cells C18 and E21. Use Format Cells and click the Border tab. In the Presets section, click both Outline and Inside. Click the Patterns tab and choose a pale shade from the Cell shading section. Then click OK.

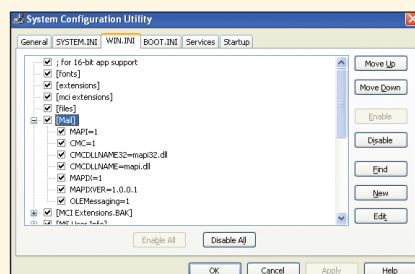
5 We also want to ensure that the people filling in the form cannot alter any cells other than those indicated by shading. This can be done by unlocking these cells and then applying protection to the sheet. Select the same cells as you did in the previous step, re-open the Format Cells dialog and go to the Protection tab. Remove the tick against Locked by clicking in the box and pressing OK.

TROUBLESHOOTING

If you discover that the command Mail Recipient (as Attachment) is missing from the list of options under File, Send To, you need to check that both the following lines are in the Win.ini file:

MAPI=1
MAPIX=1

If you are using Windows XP, the easiest way to do this is to open Help and Support from the Start Menu and select Tools under the heading Pick a



Task. Click on System Configuration Utility in the left-hand panel and again on the link that appears. In the dialog box that appears, click the WIN.INI tab, expand the [Mail] entry and see if the above entries are included. If they're not, select the word [Mail], click the New button on the right and add them manually. In Windows 98, you can do the same by running SYSEDIT from the Start Menu. When the system editor opens, navigate to the Mail section.

Another problem you may encounter is that selecting Send To Mail Recipient (as Attachment) brings up an error. This is probably because Windows doesn't know your preferred email application. You can specify this by launching Outlook Express and clicking Tools, Options. On the General tab, click the Make Default button second from bottom. Other email software will have a similar facility somewhere in its options. Click OK, then quit and relaunch Excel and the Send To Mail Recipient (as Attachment) command should work.



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Before protecting the sheet, we'll look at other aspects of the form's presentation.

Open the Options dialog box using Tools, Options and click View. We can remove the gridlines to make the form look more finished by removing the tick against Gridlines in the Window options section. Also remove the ticks against Row & column headers, Horizontal scrollbar, Vertical scrollbar and Sheet tabs. All these contribute to a more professional impression. In the Show section, remove the ticks against Formula Bar and Status Bar and click OK.

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To turn protection on, select Protection from the Tools menu and then choose Protect Sheet. In the dialog box that opens, remove the tick against Select locked cells, so only Select unlocked cells is ticked. When the recipient of the form fills it in, they will only be able to change the pale yellow cells, and by pressing the Enter or Tab key they will automatically go to the next unlocked cell. You have the option of setting a password to strengthen protection. If you do so, you will be prompted to confirm the password once you click OK.

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The idea is that this form will be used repeatedly every time someone wants to request a loan. So it makes sense to save it

as a template. Go to File, Save As. Enter the name Loan Request Form and choose Template from the drop-down list next to Save as type. This ensures it has the file extension .xlt and automatically puts it in the Templates directory. Once you have saved it, you need to close it to be able to use it as the basis of a new spreadsheet.

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To base a new spreadsheet on the template, you have to use the command File, New rather than clicking the New icon in the Standard Toolbar. When you use this command, you can choose from the available templates. In more recent versions of Excel, you'll need to click the Templates, On my computer... link that appears in the task pane to open the Templates dialog box. When you save the first spreadsheet based on this template, the name Loan Request Form1.xls will be supplied automatically.

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We are ready to email the form as an attachment. Click the File menu and expand it if necessary by clicking the arrow at the bottom. Click Send To and choose Mail Recipient (as Attachment). A new email should open in your email client – in this case, Outlook Express – with the Excel document attached.

Enter the contact to whom you want to send the form by typing or clicking the To button to

select from your address book. The subject line is filled in with the name of the file, but you can modify this to create a more informative message.

You need to type a message to give instructions to the recipient on how to complete and return the form. We've included the message, "Save the form once it has been completed under a different name using your initials at the end of the filename to provide a unique identifier. Return it to me using the command File, Send To, Mail Recipient (as Attachment)."

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The email has now arrived in the inbox of the recipient with a message and a paperclip icon. The recipient must click on the paperclip to reveal the name of the attachment together with the Excel icon that indicates the program required to work with it. Clicking on the filename pops up the Mail Attachment box asking the recipient to confirm that they want to open the file along with a reminder that attachments can be dangerous. Click Open to open the document in Excel.

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Having completed the form as indicated by the shading, the recipient needs to save it as directed, using their initials to give it a unique name. It can then be returned using the method by which it was sent. **ES**

